

Work Less, Grow More: A Guide to Automating Your Small Business

By Bench Accounting

In business, time is one of your greatest assets. But as a small business owner, you're often dealing with an endless list of To Do tasks and back office admin that take you away from focusing on what matters most.

The good news is that apps and online services have sprung up to manage and automate many of the time-consuming tasks that are part of running a business.

To take advantage of automation, you just have to know where to look. We compiled a list of helpful tools and online services that will save you hours of time each month. Pick and choose the ones that suit your needs, and put the time draining parts of your business on autopilot.

Social Media

Maintaining a presence on social media can be a full time job. Save time on the task with [Edgar](#), a set-and-forget social scheduling app that lets you upload and store all of your social media posts in an online archive. Once uploaded, [Edgar](#) automatically sends your updates out across multiple social media channels, keeping followers dialed in to your brand.

If you need to monitor and reply to a large volume of customer questions on social media, [Buffer](#) and [Hootsuite](#) both offer better features for keeping on top of social conversations.

Blogging

If you use WordPress for your blog, [CoSchedule](#) can save you plenty of time. The app lets you plan, write, and schedule blog and social media posts from a centralized platform. You can also give your employees access to the app, so they can oversee and contribute to your business's blogging output.

Design

Good design can go a long way in connecting your brand to your customers. If you design your business's marketing assets, [Canva](#) will come in handy. The intuitive drag-and-drop platform helps you quickly create graphics for your website, business presentations, social media posts, and more.

If you'd like to hire design support, but your budget can't cover high agency fees, [Design Pickle](#) is a happy middle ground. The online design service fulfills an unlimited number of design requests for a flat monthly fee.

Finding Free Images and Photography

Finding the perfect image for a blog post or your website used to be a chore until [Unsplash](#) and [Death to the Stock Photo](#) came along. Both offer a huge library of free, do-whatever-you-want images that you can use for, well, whatever you like.

Payroll

If you're spending too much time overseeing payroll, Gusto can lighten the load. The cloud based service.

Adding new employees to the system can take hours, collecting and filing paper forms is tedious, and remembering to submit payroll or file tax documents is stressful.

Managing employees' day-to-day tasks and workflow is plenty of work as is. Throw payroll into the mix, and you've got a full plate. Use [Gusto](#) and give yourself a break.. It's a cloud-based service that handles all your payroll needs, from filing taxes to sending employees pay stubs and W-2s.

Recruiting

When it comes to recruiting team members, there are a ton of possible channels to choose from. Luckily, you don't have to. [ZipRecruiter](#) lets you write a job posting and publish it on over fifty recruiting sites at once, as well as manage incoming applications from a single, centralized platform.

Or, if you're expecting a large number of applicants, try [Workable](#). As well as allowing you to promote job openings, it compiles incoming cover letters and resumes into easy-to-read applicant profiles.

Training

As your business grows, it can be stressful onboarding new employees and getting them up to speed. [Trainual](#) lets you document your company's processes all in one place. When a new employee joins your company, invite them to Trainual and you can track their training process and test their knowledge. It's the hands-free alternative solution to playing teacher for a new hire.

Job Tracking

Especially if your business is service-based, it can be very difficult to keep track of your various ongoing jobs. One solution is [Trello](#), which allows you to organize items as cards in separate lists, with relevant files and comments attached. It's a great way to coordinate activities when working with a team. For a more linear approach, you could also try [Pipefy](#), a service that allows you to move jobs along a virtual "pipeline."

Bookkeeping

If you don't enjoy financial admin, you're not alone. A recent survey found that 56% of small business owners found bookkeeping "[particularly draining](#)." Handling finances, banking, and marketing, were also other unpopular tasks.

Although you can take a DIY approach to the task, it's easy to make errors, and time spent on bookkeeping is time away from other important tasks. Remove the room for error with [Bench](#), an online bookkeeping service that assigns a team of dedicated bookkeepers to your account, while giving you access to your books through easy-to-use, cloud-based software.

Invoicing

Tracking and reporting the hours you log working on a project can take up as much time as doing the work itself. Save time on the process with [FreshBooks](#). The app lets you track your expenses and billable hours. It then goes the extra mile, generating and sending online invoices to clients on your behalf.

Answering the Phone

If the phone interrupts you all day, but you're not ready to hire a receptionist, consider [Ruby Receptionist](#). The app pairs you with a virtual receptionist—someone to act as a safety barrier between you and incoming calls. Ruby Receptionists provide simple info, take messages, and transfer calls that meet your criteria.

Booking Meetings

If you've ever watched your week fill up with meetings—and had to manually enter them into your calendar—you've probably wished you had a personal assistant to keep everything organized. [Clara](#) is here to fill that role. The service combines machine learning with natural, human syntax to create a virtual assistant who can manage all your to-dos, whether they're for tomorrow or three months down the line. Write Clara a request, or cc: her in an email, and leave your schedule in the hands of a (robot) professional.

Keeping in Touch with Valued Clients

Word of mouth is a great source of referrals and new business. But how do you track it? Enter [Contactually](#), an app that categorizes your key business relationships, and follows up on a regular basis, helping you automate outreach and close more business.

Arranging Business Travel

When it comes to business trips, save yourself some travel-induced stress. [Triplt](#) streamlines that travel planning process, sifting through your inbox for reservations with airlines, hotels, rental cars and the rest. You can also share your travel plans with someone else, or invite them to collaborate in the process.

Tracking Mileage

If you use a vehicle for business, [MileIQ](#) is indispensable. The smartphone app tracks your mileage and keeps a list of your most frequent trips. With a few swipes you can classify the purpose of your business-related trips, and calculate their tax-deductible value.

Outsourcing Work

For simple tasks, sometimes it's best to bring onboard someone from outside your core group, so you can leave your best employees free to focus on more complex projects. If it's your first time bringing in remote workers, [Upwork](#) is the place to start. You'll get the chance to browse a huge number of freelancer profiles, until you find someone perfectly suited to the task at hand.

Meanwhile, if you are starting a new project and specifically need to hire a developer, [Matchist](#) can help. Based on your project's description, the team at [Matchist](#) will hunt down and pair you with the ideal developer to help you complete the job.

Ordering Food

Nothing kills productivity like an empty stomach. [Postmates](#) is an Uber-for-food delivery service that eliminates phone calls to busy restaurants and stacks of paper take-out menus. .

Remembering Passwords

The age of the Post-It note stuck to the bottom of your computer monitor is dead. News that LinkedIn users, including Facebook founder Mark Zuckerberg, were hacked in 2016 highlighted how important it is be vigilant and maintain secure passwords for your business.

Remove the hassle of remembering complicated passwords with [1Password](#) and [1Password For Teams](#). Both services generate high-security passwords, so you don't have to, and store them securely in one place. No pen or post-it necessary.

Customer Service

Receiving customer inquiries and orders in your inbox is great, until it becomes an administrative nightmare. When business is going well, keeping track of all those tickets can become overwhelming. Try de-stressing the process with [Help Scout](#)—ticketing software with a simple, easy-to-learn platform, and a contact form that suggests responses to your customers. Meanwhile, [GrooveHQ](#) allows you to insert helpdesk access into any page, while amalgamating your email, social, and chat channels into a single platform.

Data Management

When it comes to organizing your business, a simple spreadsheet will take you only so far. [Fieldbook](#) is a next-level solution for organizing data. It lets you create and link spreadsheets, treating them like your own, customized database. You can sort, view and filter information to your own exact specifications.

As apps and online technology continues to improve, there's no reason you should be shouldering all of the administrative burden in your business. Put the time-consuming parts of your business on autopilot and leave the heavy lifting to technology. You'll save yourself precious time and energy, and set your business on the path to growth and long-term success.

About Bench

Bench is a new kind of online bookkeeping service. We pair you with a team of dedicated bookkeepers and use simple, elegant software to do your bookkeeping for you.

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